Separate Ways: Delinking Your ILLiad Data

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Kennesaw State University Libraries

KSU

- State institution, University System of Georgia
- R2 institution
- Enrollment of approx. 50,000 students
- 2 campuses, 2 libraries

Resource Sharing

- 1 full-time manager
- 2 full-time assistants
- 1-2 part-time student assistants per semester
- ILLiad since 2004
- Shared server since 2015, one symbol (GKJ)
- Hosted by OCLC

Definitions

Delink

- Severing the connection between a request in ILLiad and patron data.
  - Transaction stays in ILLiad, patron information is removed.
  - Completed via OCLC ticket.

OCLC | Support

Delete

- The permanent deletion of request history from ILLiad.
  - Transaction removed from ILLiad.
  - Completed manually with the Database Manager



Why delink + best practices

Data retention standards

- Records retention guidelines typically state that ILL borrowing and lending request history should be kept for 3-5 years.

Database size

- Self-hosted institutions may want to save space.

Patron Privacy

- Delinking patron data from old request history is a way to responsibly maintain ILLiad request history for data and statistics without holding on to unnecessary information.

"Libraries should clearly define any collection of a person's library use. Such data must be: transparently disclosed to users; retained for the minimum amount of time necessary; and anonymized when possible."

– ALA, *Privacy: An Interpretation of the Library Bill of Rights*

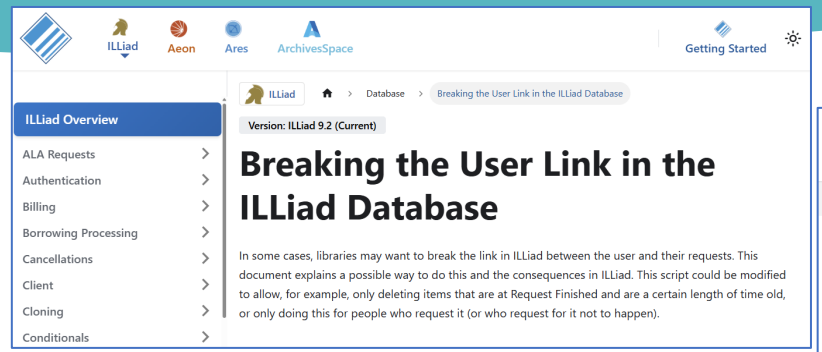
Planning to delink

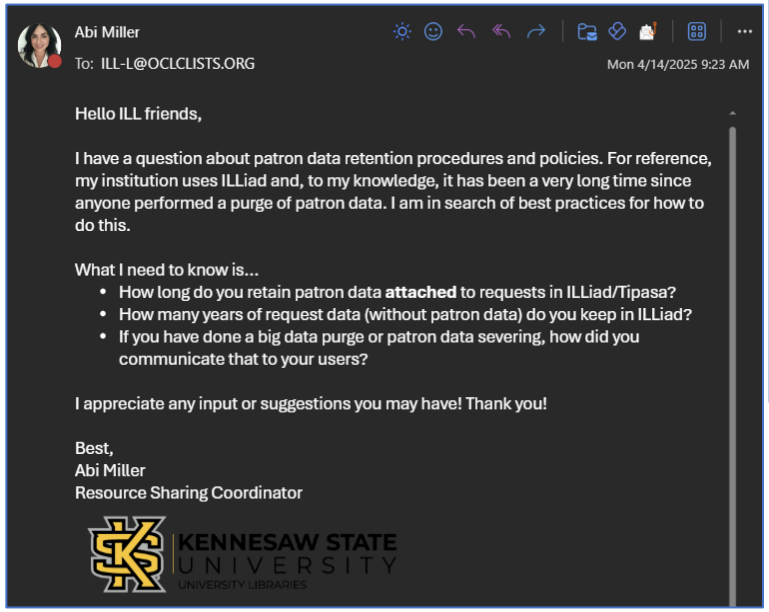
Identify your starting point

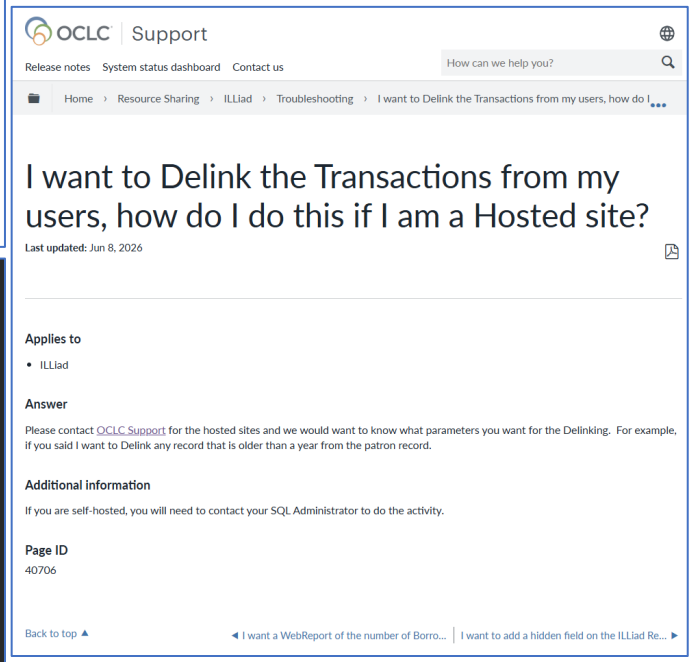
- What are the record retention requirements of your institution and/or state?
- Are you self-hosted or hosted?

Develop a strategy

- How long to keep patron data linked
- Learn the process and make a timeline







Decide what to delete

Retention Length

- CONTU guidelines recommend 3 years
- Record retention requirements of your institution and/or state

Deletion Cycle

- Calendar year
- Academic/fiscal year
- Each semester



Process and timeline

April

Pull Requests by Username report for previous year.

Inform patrons on the report of request history cleanup.

May

Send patrons second notice of request history cleanup.

Export request history you want to keep.

June

Send patrons final reminder of request history cleanup.

Create "dummy" username in ILLiad.

Prep and send query parameters for OCLC delink ticket

Early July

Use the ILLiad Database Manager to delete transactions.

Early/mid July

Check ILLiad to ensure patrons were delinked and/or old requests were deleted.

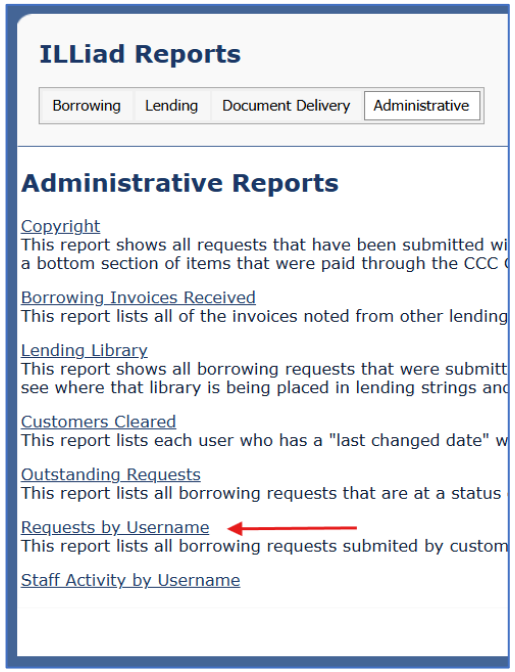
Inform patrons

Pull Requests by Username report for previous year

Notify patrons of request history cleanup

- Suggest citation manager for request history preservation
- Multiple notification emails
- Offer to export request history

Inform collegiate librarians!



Email subject line:

NOTICE: Upcoming Cleanup of ILLiad Interlibrary Loan Request History

Email body:

Hello,

The KSU Libraries Resource Sharing Team would like to inform you of scheduled maintenance in ILLiad, our interlibrary loan request system, to be completed by **July 1, 2026**. To help ensure the privacy and security of our patrons, **all ILLiad requests submitted before July 1, 2025, will be deleted from user accounts**. Request history from the previous year will remain available and visible in your account.

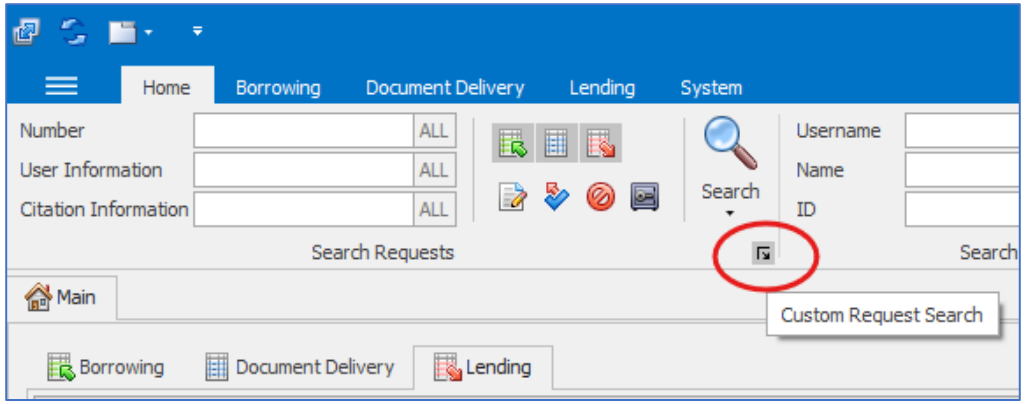
We encourage you to save any request details or citation information you may wish to keep **before July 1, 2026**.
If you have any questions, please contact the KSU Libraries Resource Sharing Coordinator by phone, at 470-528-6002, or by email (illoan@kennesaw.edu).

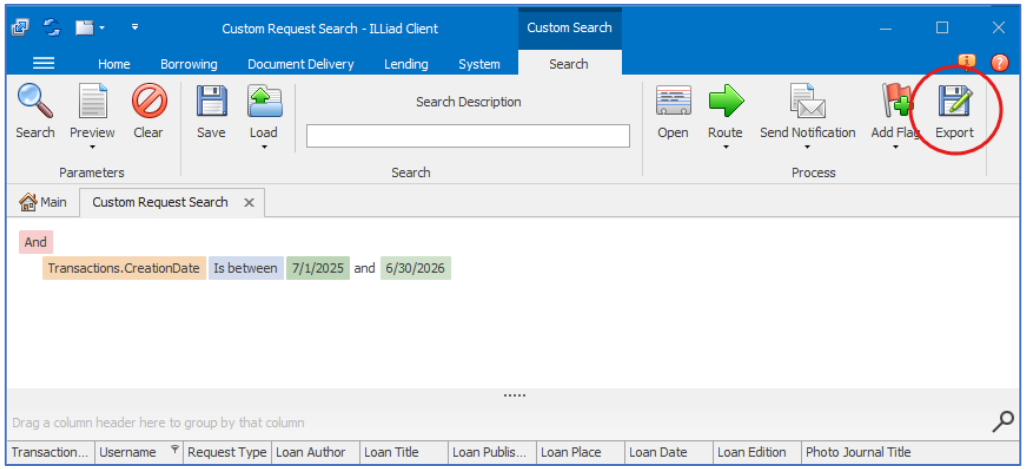
Sincerely,
KSU Libraries Resource Sharing Team

Back up your data

Consider backing up request history from ILLiad

- You may want to export request history to store for statistical purposes
- This can be done through an ILLiad custom search
- Request history can be anonymized in Excel by deleting patron person info
- Retain department and patron status

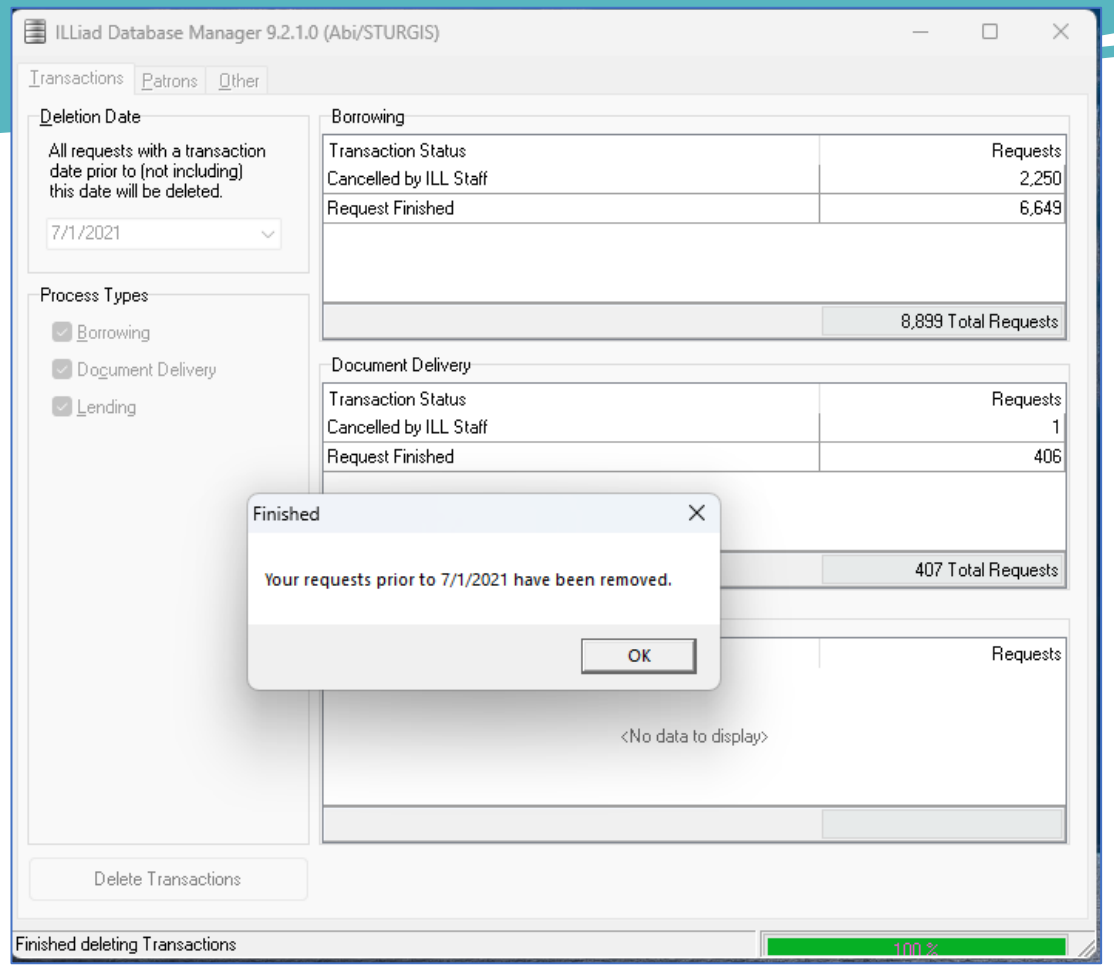




Implement the deletion

ILLiad Database Manager

- Get log in details from OCLC
- Transactions from before the date you select will be deleted (cannot be undone)
- Give yourself lots of time



Implement the delink process

Create "dummy" username in ILLiad

- Delinked request history will be transferred to this username
- Example: delink_july[YEAR]

Prepare delink query

Send OCLC ticket

Delinking condition sample to send to OCLC

MOVE request to username delink_july[YEAR]

IF Transaction Status = (Request Finished) OR (Cancelled by ILL Staff)

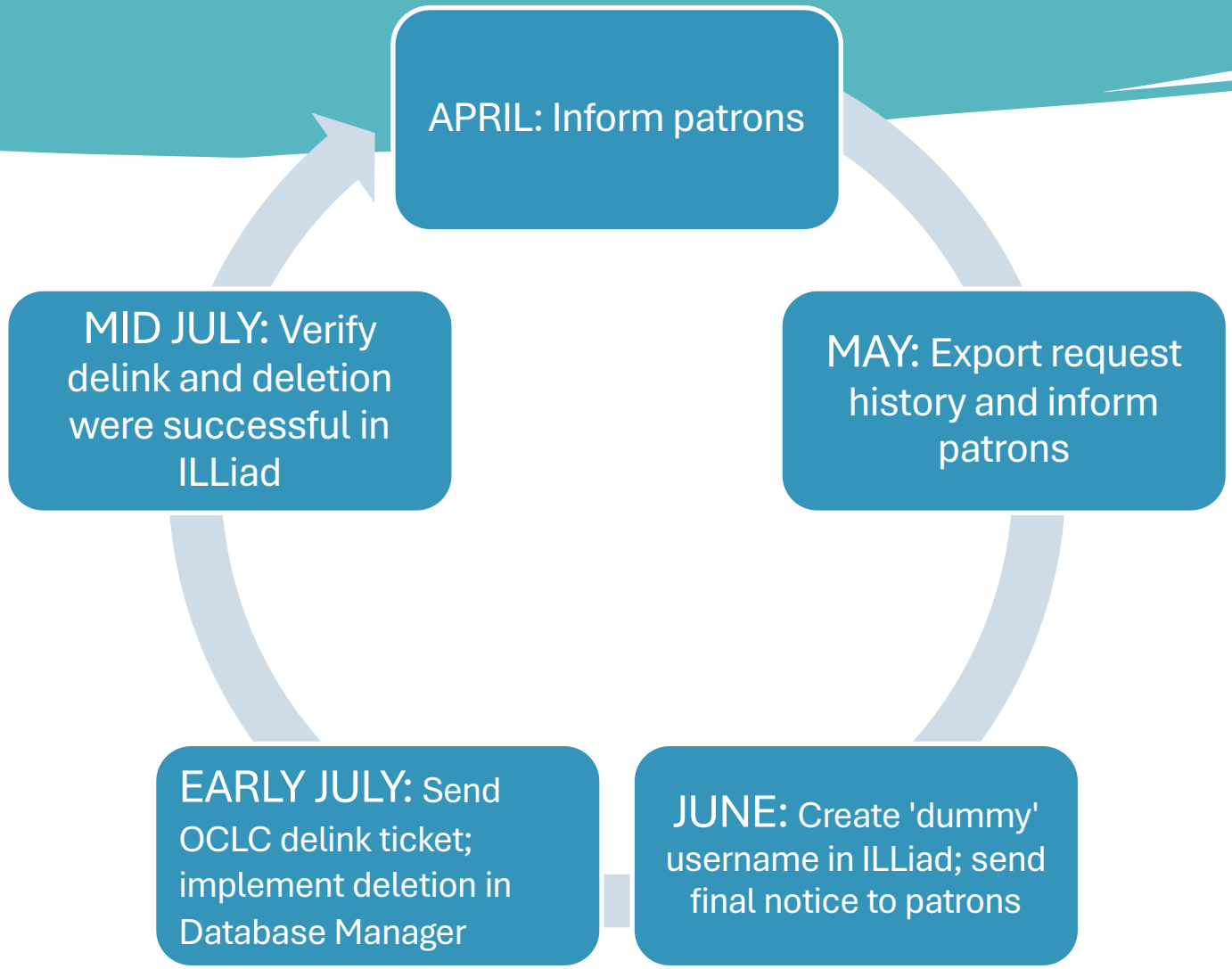
AND Creation date < July 1, [YEAR]

AND Username does NOT equal any of [previous delink dummy usernames]

Plan for the future

Build a continuation strategy

- Easier maintenance
- Proper data retention



Sources

Cho, Silvia; Posner, Beth; and Thornley, Elise, "Delinking & Deleting Patron Information in Illlad" (2022). *User Groups*. 1. https://knightscholar.geneseo.edu/ipp-user-groups/1.

"Privacy: An Interpretation of the Library Bill of Rights," American Library Association, July 7, 2006 https://www.ala.org/advocacy/intfreedom/librarybill/interpretations/privacy. Document ID: be1028a0-0a48-49cb-9c97-d974a453a148.

Thielman, Sam, "You are not what you read: librarians purge user data to protect privacy," *The Guardian*, (2016). https://www.theguardian.com/us-news/2016/jan/13/us-library-records-purged-data-privacy.

"USG Records Retention Schedules: CATEGORY: Library/Archives/Records Management and Museum," University System of Georgia records retention policies and procedures. https://www.usg.edu/records-management/schedules/libraryarchivesrecords-management-and-museum/.

Questions?

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